



Web Administrator System Guide

February 27, 2023

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Web Administrator Definitions

Use the information below to help select the user’s appropriate access level when setting up a new and/or updating a current user in the online commitment system. You must assign a “Security Groups” **and** a “Departments” to every user profile.

Security Groups

Assign users a Security Groups, which determines the access they will have in the online commitment system:

- **Lending Partner Admin** – Allows user to set-up user accounts “Web Admin”.
 - More than one web admin is permitted.
 - If you select this option, you must also select “Lending Partner,” “Lending Partner Associate,” and “Lending Partner Read Only.”
- **Lending Partner** – Allows users to lock and “True and Certify” a loan, as well as make changes to a loan once it is locked.
- **Lending Partner Associate** – Allows users to lock the loan.
- **Lending Partner Read Only** – Allows user to view pipeline and upload closed loan files.

All Security Groups have access to order documents.

**The web administrator should have all four Security Groups.*

Departments

Assign users a Departments based on their role in the loan process (select only one):

- **Loan Officer** - Select this option for any originator. This will ensure loans are assigned correctly to individuals that originate loans.
 - You must include the loan officer’s NMLS license number.
- **Lending Partner** -Select this option for anyone who is not a loan officer, but needs access to the system (i.e. underwriter, closer, processor, lock desk, etc.).
- **Lender QC** - Select this option for anyone who should be notified by the Minnesota Housing Quality Control team when a loan is selected for audit.
 - This user will be responsible for working with and resolving Quality Control audits.

**The web administrator should have all three Departments.*

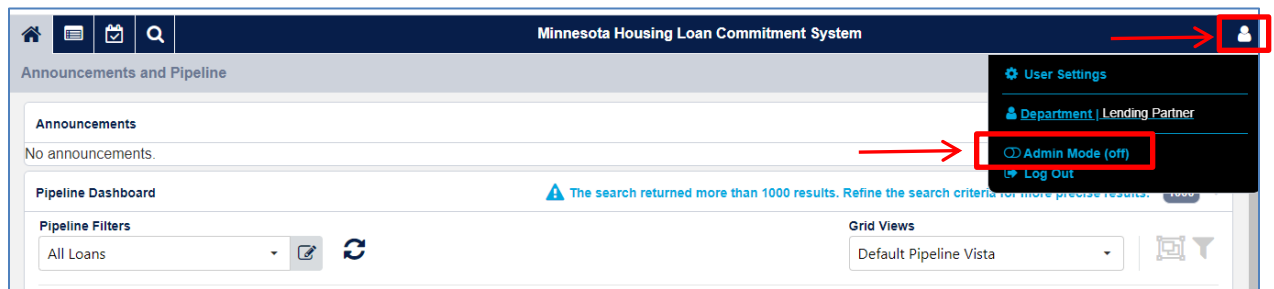
Setting up a New User

- Log into the [Online Commitment System](#).

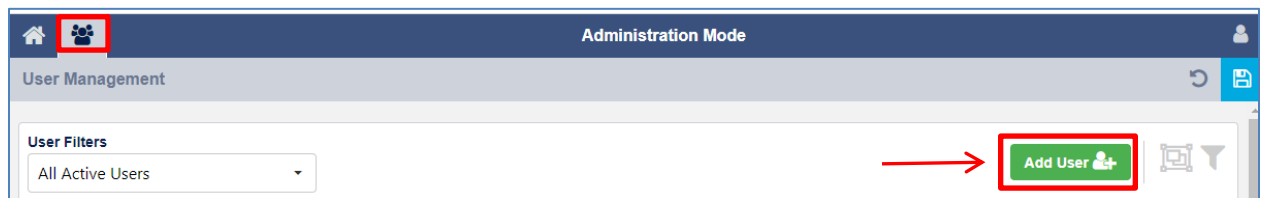
After login into the Online Commitment System, the initial landing page will be the **Announcements and Pipeline** screen.

To create a New User

- Click on **User Profile** icon
- Click on **Administration Mode (off)** to access **User Management**.



- Select the User Management icon and click **Add User** icon in the top Right corner of the page.



- Complete the following fields under **General Information** tab
 - Account Expiration
 - The account expiration date is automatically set by the system a year from current date.
 - First Name
 - Last Name
 - Email Address
 - Work Phone
 - Choose a Channel
 - If lender is originating both HO (home ownership) and HI (home improvement) select the most relevant channel.

- Failure to select a channel will result in not being able to see the new user.
- If the user originates both HO and HI, they will only be able to import a loan application under the channel assigned to them and will have to manually enter the loan under the other channel.

***Note:** Middle Name, Ext, Fax Number, Position, Channel, Commission % and User's Manager and User is a Manager checkbox are not required fields.

- Complete the following fields under **Authentication** tab
 - Username should be set as the **person's email address**
 - Password Requirements:
 - Must contain at least 12 characters
 - Must contain at least one uppercase letter
 - Must contain at least one lowercase letter
 - Must contain at least one number
 - Must contain at least one special character (!"#\$%&'()*+,-./:;<=>?@[\\]^_`{})
 - Password must be changed every 6 months
 - Passwords cannot be reused
 - Even if checked, Force Password checkmark **does not save** when a user account is created. It is only saved after the user account is created, Force Password is checked and user account is saved.
- *Note:** Multi-Factor Email, Multi-Factor Phone, SSO Username, and PowerBI Username are not required fields.

Complete the following fields under **Links** tab

- Select appropriate boxes to assign to the new user under **Security Groups**:
 - **Lending Partner** – Can enter a loan from lock to true and certify.
 - **Lending Partner Admin** – This is the Web Administrator; this membership should not be selected for any other user.
 - **Lending Partner Associate** – Can enter a loan through lock.
 - **Lending Partner Read Only** – Can view loan data only.
- Select appropriate **Department** (must set as Default for one of these):
 - **Lending Partner** (underwriter, processor, closer, lock desk, etc.)
 - **Loan Officer** (allows the Loan Officer name to be selected)
 - **Lender QC** (closer, post closer, etc.)
- Multiple Departments are needed:
 - Set the Default Department that is appropriate for a user (i.e. Lending Partner (Default) and Lender QC or Loan Officer (Default) and Lender QC).
- Select Operation Centers:
 - Correspondent Ops Center
 - Set as Default

- Complete the following fields under **Licensing** tab if Loan Officer user has an NMLS number.
 - Select the **Add License** icon in the bottom right corner of the User Management screen

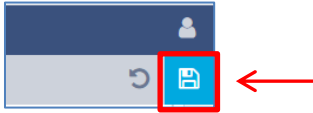
The screenshot shows the 'User Management' screen with the 'Licensing' tab selected. At the top, there's a header with 'General Information', 'Authentication', 'Links', and 'Licensing'. Below this, a user profile for 'New Blank User' is visible. A table with columns 'State', 'License Number', 'Type', 'Activation', 'Expiration', 'Active', 'Exempt', 'National', and 'Actions' is shown. In the bottom right corner, a green 'Add License' button with a plus icon is highlighted with a red box.

- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
 - License Type
 - Type NMLS will display Loan Officer's NMLS# on the documents
 - License Number
 - State auto fills N/A when NMLS is selected
 - Activation Date (date user is added)
 - Expiration Date (Enter 12/31/2099)
 - License Active is pre checked
 - Click Add

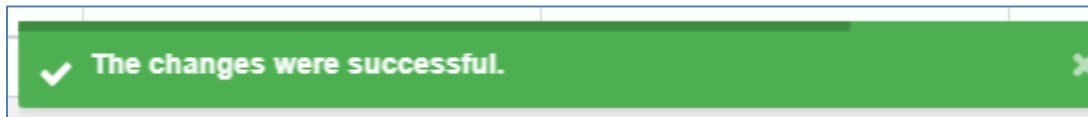
The screenshot shows the 'Add License' form. It has a title bar 'Add License' with a close button. Below the title bar, there's a red asterisk indicating required fields. The form contains several input fields: 'License Type' (dropdown menu with 'NMLS' selected), 'License Number' (text input with '651789'), 'State' (dropdown menu with 'N/A'), 'Activation Date' (calendar input with '10/03/2021'), and 'Expiration Date' (calendar input with '12/31/2099'). There are two checkboxes: 'License Active' (checked) and 'License Exempt' (unchecked). At the bottom, there are 'Cancel' and 'Add' buttons. The 'Add' button is highlighted with a red box.

- Select the **Add License** icon again to add multiple License numbers.

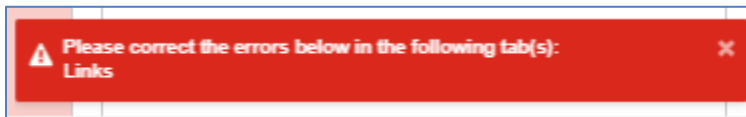
- Once all fields have been completed, select the **Save** icon in the top Right corner of the screen to complete the New User account.



- If done correctly, the following notification will display:

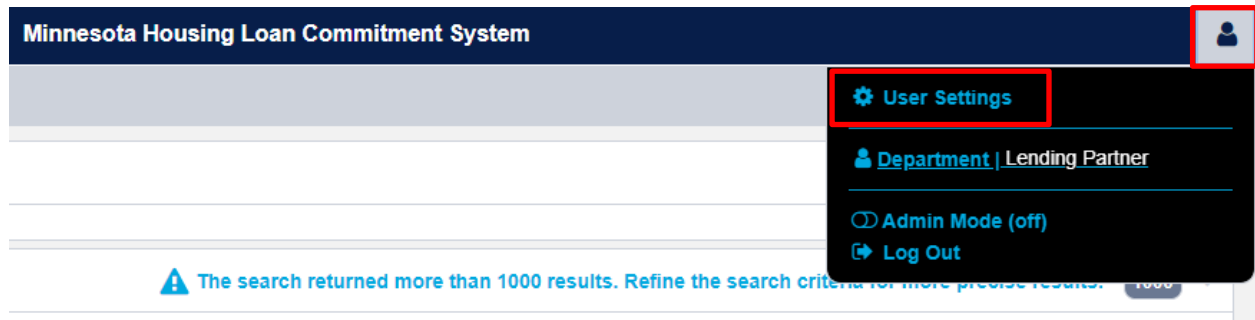


- If any red errors, clear the errors and click Save icon again. Close the red errors after the green notification displays.



Recommendation: Test the new user. Log in as the new user if able to login, email new user their username and password.

- Once the user logs into the system please have the user go in the “User Settings” to set up a new password and username/password recovery question.



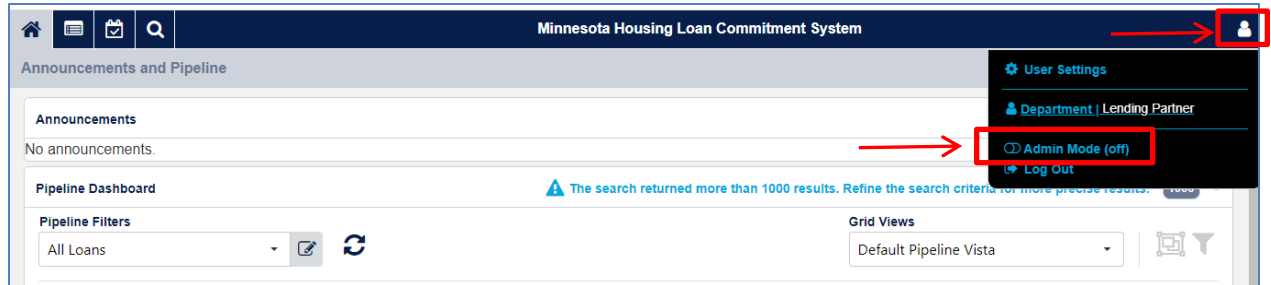
- Select “Password/Security” tab.
- Set up a new password and username/password recovery question.

The screenshot displays the 'Minnesota Housing Loan Commitment System' interface. At the top, a dark blue header contains the system name. Below it, a light gray bar shows 'User Settings' with a gear icon and a close button. A navigation bar below this has 'My Profile' and 'Password / Security' tabs; the latter is selected and highlighted with a red box. The main content area is divided into two sections: 'Password Recovery' and 'Change Password'. Each section contains a button with a lock icon: 'Change Recovery Question' and 'Change Password'. Both buttons are highlighted with red boxes. At the bottom right, there are 'Cancel' and 'Save' buttons; the 'Save' button is highlighted with a red box.

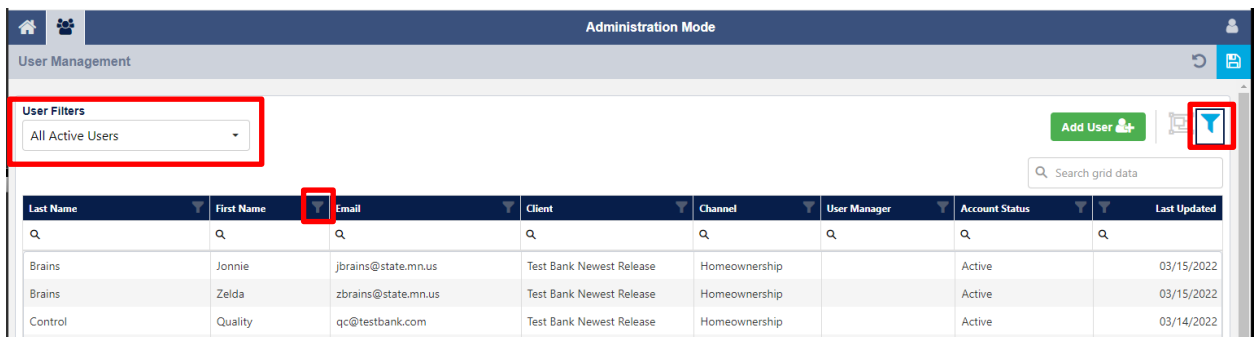
Managing a User

To manage a current user

- Click on **User Profile** icon
- Click on **Administration Mode (off)** to access **User Management**.



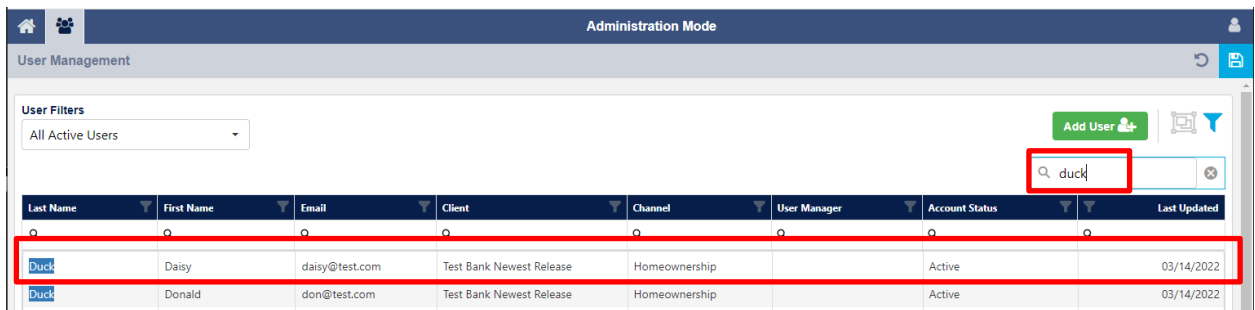
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



***Note:** Turn on column filter to filter the column

Or

- Type in the name you are looking for in the **Search grid data** text box.
 - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



- Double-click on the User that you would like to manage.

- **Locked Account**

- If account is locked, Account is Locked is checked on General Information tab.
Uncheck to unlock account.

General Information | Authentication | Links | Licensing

Record selected
Daisy Duck | daisy@test.com

Unsaved Changes

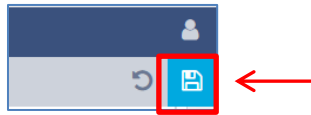
Account Status: Account Active | Account Inactive

Account Expiration: 03/14/2023

Account is Locked ☒ Force Password Change on Next Login ☐

First Name: Daisy Last Name: Duck Middle Name:

- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.



- **Password Reset**

- To reset password, type in temporary password into Password on **Authentication** tab.

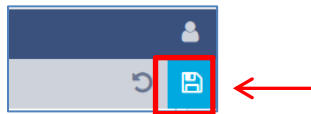
General Information | Authentication | Links | Licensing

Record selected
Daisy Duck | daisy@test.com

Unsaved Changes

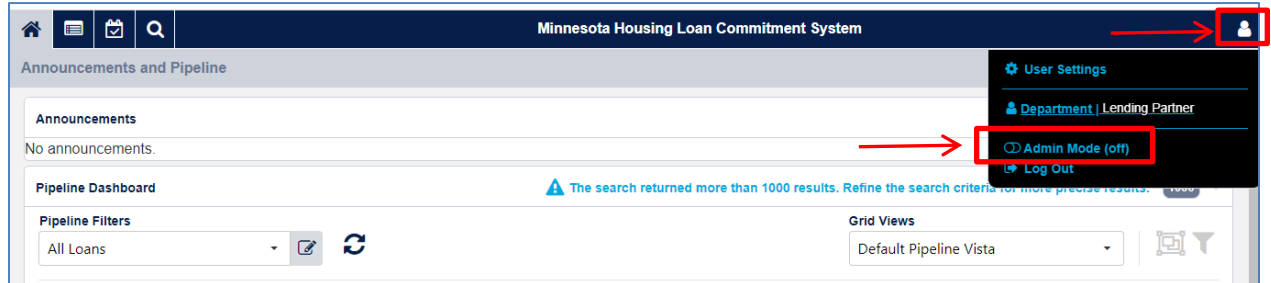
Username: daisy@test.com Password: Multi-Factor Email: username@example.com Multi-Factor Phone:

- Select the **Save** icon in the top Right corner of the screen and communicate the New Password to the User.

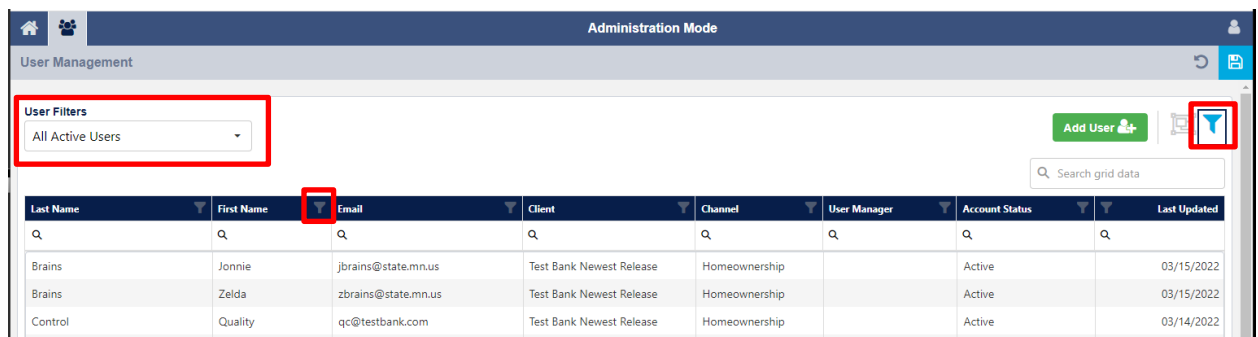


Adding a User to a New Group or Department

- Click on **User Profile** icon
- Click on **Administration Mode (off)** to access **User Management**.



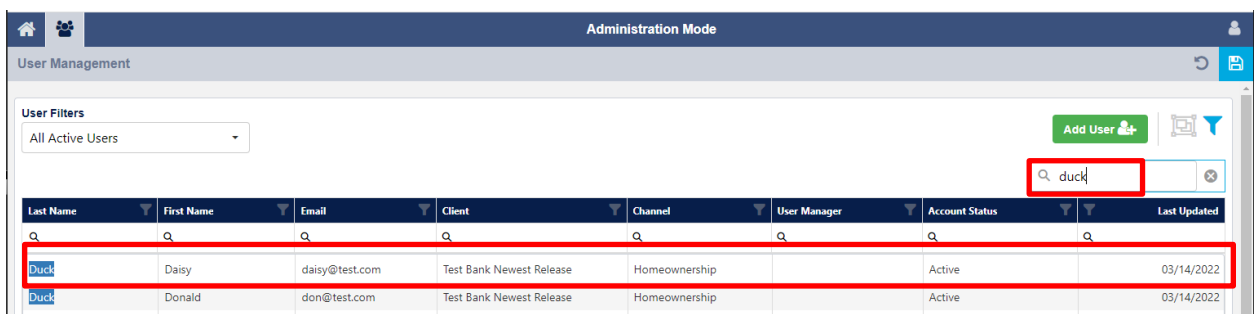
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



***Note:** Turn on column filter to filter the column.

Or


- Type in the name you are looking for in the **Search grid data** text box.
 - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



- Double-click on the User that you would like to manage.

- Make any changes to the Security Groups and Departments
 - Departments always needs 1 Department to be Set as Default

Record selected
Daisy Duck | daisy@test.com

Unsaved Changes 

Security Groups

<input checked="" type="checkbox"/>	Lending Partner
<input type="checkbox"/>	Lending Partner Admin
<input type="checkbox"/>	Lending Partner Associate
<input type="checkbox"/>	Lending Partner Read Only

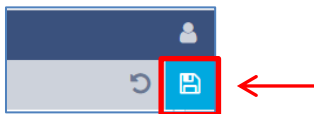
☒ Select All ☐ Deselect All

Departments

<input type="checkbox"/>	Lender QC
<input checked="" type="checkbox"/>	Lending Partner (Default)
<input type="checkbox"/>	Loan Officer

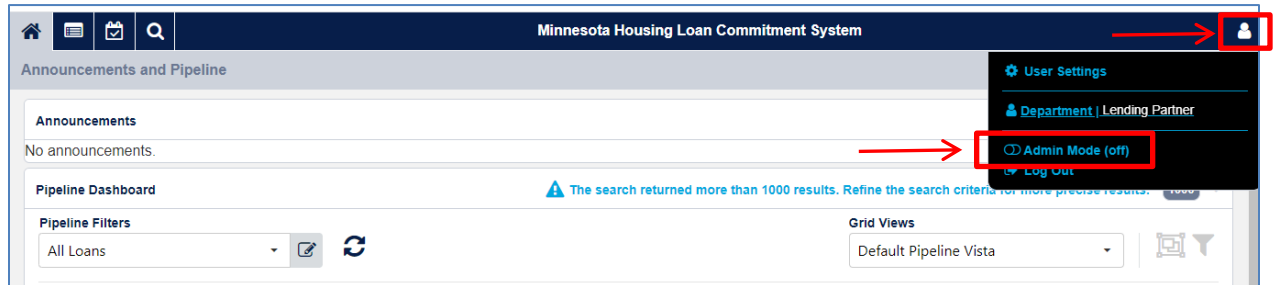
☒ Select All ☐ Deselect All

- Select the **Save** icon in the top Right corner of the screen.

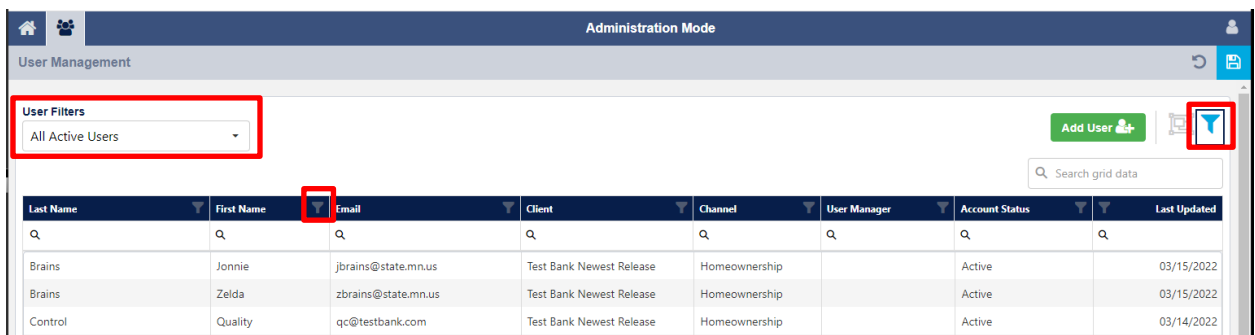


Adding or Updating Licensing Information for a User

- Click on **User Profile** icon
- Click on **Administration Mode (off)** to access **User Management**.



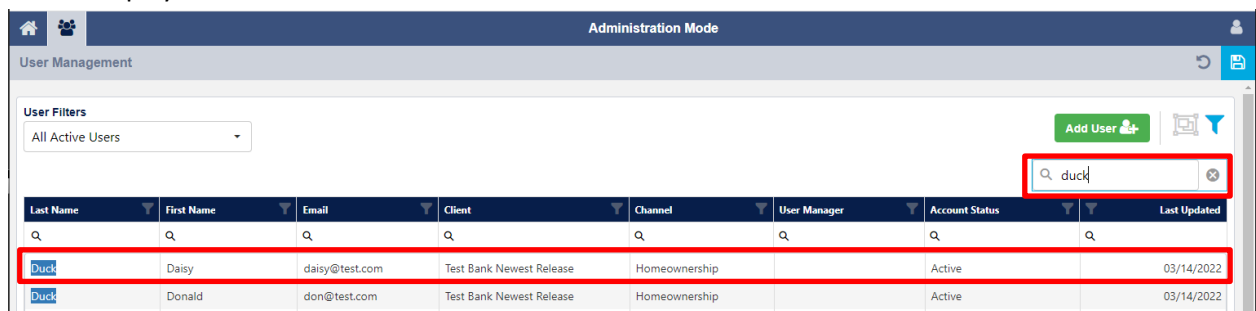
- Select the user from the list of active users:
 - Users that are not active can be found using User Filters: All Users.



***Note:** Turn on column filter to filter the column

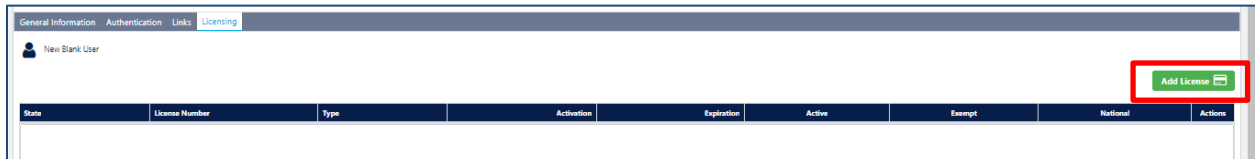
Or

- Type in the name you are looking for in the **Search grid data** text box.
 - A scroll bar will appear to the right of the grid if more users are available than what is displayed on the screen.



- Double-click on the User that you would like to manage.

- Select the **Add License** icon in the bottom right corner of the User Management screen



- Add the following required Licensing Information for the New User: Click on the fields to select options for the dropdown menu:
 - License Type
 - Type NMLS will display Loan Officer's NMLS# on the documents
 - License Number
 - State auto fills N/A when NMLS is selected
 - Activation Date (date user is added)
 - Expiration date (Enter 12/31/2099)
 - License Active is pre checked
 - Click Add

The 'Add License' form is shown with the following fields and values, where required fields are marked with an asterisk and highlighted with red boxes:

- License Type ***: NMLS
- License Number ***: 651789
- State ***: N/A
- Activation Date ***: 10/03/2021
- Expiration Date ***: 12/31/2099
- ☒ License Active
- ☐ License Exempt

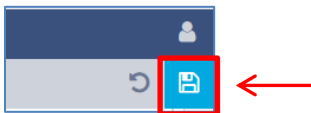
At the bottom, there are 'Cancel' and 'Add' buttons. The 'Add' button is highlighted with a red box.

- To modify License, click on the pencil in the Action column.

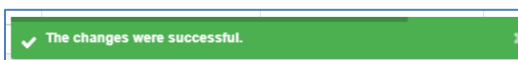
The screenshot shows the 'User Management' screen with the 'Licensing' tab selected. A table lists licenses, with the first row showing details for 'Keanu Reeves'. In the 'Actions' column, there is a pencil icon, which is highlighted with a red box.

State	License Number	Type	Activation	Expiration	Active	Exempt	National	Actions
N/A	78777777	NMLS	12/08/2021	12/31/2099	✓		✓	

- Make any changes on the Edit License screen.
- Select the **Save** icon in the top Right corner of the screen.

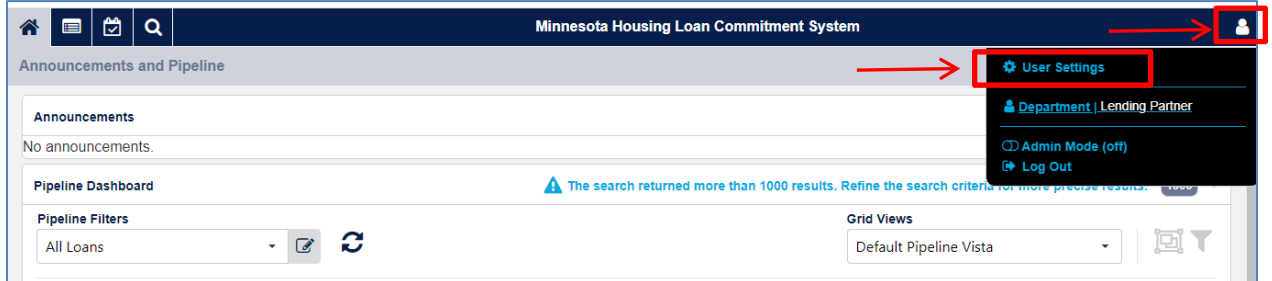


- This notification will display:



Username/Password Help

- Users must be logged in to reset their own password and establish a security question
- Click on **User Profile** icon
- Click on **User Settings**



- Add Recovery Question and Recover Answer (turned on the eye to see text)
- Typed Current Password and New Password twice
- Click Save

- This notification will display:

